MARYLAND JUDICIARY

GEARS

General Enterprise And Resource Support

# PO230

**Last Revised: June 27, 2013**

# Table of Contents

# PO230

## PO230 Creating and Managing Requisitions in Purchasing

**Course Overview**
In GEARS, requisitions are entered in the eProcurement and the Purchasing modules. The AOC Procurement and Contractor Administration Office (AOC Procurement) enters and manages requisitions using the Purchasing module.

Prior to the creation of a requisition, you can view the available funds in the budget you plan to use on your requisition to ensure that there are sufficient funds available to commit to a purchase.

The *PO230 Creating and Managing Requisitions in Purchasing* addresses entering, updating and inquiring on requisitions entered in Purchasing for goods and services and is intended for AOC Procurement Buyers.

**Course Outline**
The following lessons provide step-by-step instructions on entering, updating, and inquiring on commitments in GEARS and understanding the concepts associated with purchasing goods and services for the Judiciary.

- Course Audiences and Prerequisites
- Lesson 1: Creating Requisitions in Purchasing
- Lesson 2: Managing Requisitions
- Lesson 3: Inquiring on Requisition Information
- Course Summary

## Course Audience and Prerequisites

**Audience(s)**
The Judiciary audiences for this course are:

- AOC Procurement and Contract Admin

**GEARS Role(s)**
This course is intended for Judiciary employees with the following GEARS role(s):

- Procurement Buyer

**Prerequisites**
The recommended prerequisites for this course are:

- INT100 Introduction to GEARS
- PO100 Understanding GEARS Procurement Processes

## Understanding the Requisition Document Structure

In GEARS, there are four levels in the transactional hierarchy of a requisition:

- Header
- Line
- Schedule
- Distribution

The four levels in the hierarchy contain the important information that defines the transaction (i.e., who, what, when, where, and how much). Purchase orders use the same hierarchy.

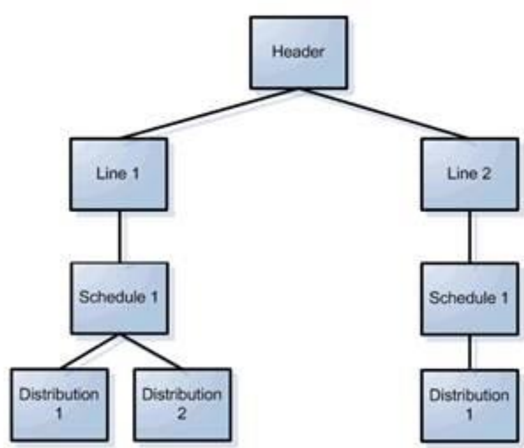
After completing this section, you will be familiar with the sections of a requisition and be able to identify where the following information is located on a requisition:

- the requisition vendor, amount, status and other identifying information
- line information (for what you are reserving funds)
- the funding source(s) of a requisition (i.e., the PCA, Account (sub-object) and other Chartfield accounting distribution to be used to record the transaction in the budget and general ledger)

The example below illustrates the transaction hierarchy. In this example, there is one header, two lines, two schedules and three distributions for the transaction.

The GEARS system allows a single line on a requisition to be associated with more than one scheduled delivery. This functionality is unlikely to be used on a frequent basis at the Judiciary but it is important to understand how it works. In a similar manner, the charges on a single line on a requisition can be shared across several distributions. For example, two departments who plan to share a printer could each absorb half of the purchase cost of the printer.

Multiple schedules and multiple distributions can be very useful under the right set of circumstances but these features may not be used very frequently at the Judiciary.



**Header**

Headers contain high-level information about the transaction. This information applies to the entire transaction and is "inherited" by the attached line(s), schedule(s), and distribution(s). Below are other attributes of the header of a transaction:

- There is only one header per transaction
- For commitments, header information includes the:
  - *Requester: user requesting the good or service*
  - *Req Date: date requisition created*
  - *Req ID: number assigned to the requisition*
  - *Accounting Date: date recorded in the GEARS General Ledger for the transaction*
  - *Status: status of the requisition (e.g., open, approved, canceled, completed)*

**Line**

For requisitions, line-level information includes the goods or services being requested, how many goods or services are being requested, how much the good or service costs, what the calculated dollar amount of the goods or services is (based on the selected unit of measure).

Below are other attributes of the line of a transaction:

- Headers may have one or more lines. In the illustration above, there are two lines. A transaction could potentially have an unlimited number of lines.
- There must be at least one line per header
- The line contains item or service level information about the header
- A line can be an "amount only" if it will be invoiced by amount rather than by quantity. Lines for services or flat amounts are generally "amount only" lines. Exceptions may include services that are billed by the hour, day, week, etc.

The line contains the following major fields:

- *Item ID:* Item ID assigned to a good/service
- *Description:* Description of the good or service
- *Unit of Measure (UOM):* used to quantify or track resources (e.g., EA – Each)
- *Quantity:* quantity to be obligated; lines for services or flat amounts will have a quantity of "1".
- *Price:* unit price or cost of a service
- *Category:* type of good or service
- *Status:* status of the requisition line (e.g., open, approved, canceled)

**Schedule**

In GEARS, schedule-level information identifies the due date of a purchase and the Judiciary shipping location or location where a service will be performed. Each line must have a corresponding Schedule. The line must have a minimum of one schedule. The illustration above shows only one schedule per line.

The GEARS System allows a single PO line to have multiple delivery schedules. For example, a PO line for 10 each could have 5 each scheduled for delivery on 12-1-2013 and 5 each scheduled for delivery on 1-1-2014. This functionality may not be used often at AOC.

The schedule contains the following major fields:

- *Due Date:* Item ID assigned in the Item Master associated with a good/service
- *Ship To:* The value used to indicate where goods are to be shipped or where a service will be received

**Distribution**

The distribution of a transaction contains accounting (funding source) information about the line and schedule. The distribution is where Chartfield information defines how the cost of the purchase will be expensed, whether the expense is done by quantity or amount, and what percent of the quantity or amount to expense. Other attributes of the distribution are:

- A distribution can be split by amount or quantity. In the illustration above, Line 1 on the transaction has two distributions.

The fields on the distribution include:

- *Distribute by*: quantity or amount, the methods to allocate the expense. **NOTE:** Requisitions for services or flat costs are generally distributed by "Amount."
- *Percent:* percentage of either the quantity or amount to be distributed or allocated to a funding source entered (depending on the "Distribute by" method selected)
- *Chartfield:* accounting codes used to identify the funding source for the transaction
- *Entry Event*: codes used to define the accounting entries for the transaction
- *Status:* status of the distribution line (e.g., open, canceled, closed)

# Lesson 1: Creating Requisitions in Purchasing

**Lesson Overview**

A requisition is required when a good or service is to be acquired from a vendor. Requisitions are entered by AOC Procurement using the Purchasing module.

**Lesson Objectives**

After completing this lesson, you will be able to:

- Verify funds availability in Commitment Control
- Create a requisition for a catalog item
- Use default options on a requisition

## 1.1 Verifying Funds Availability

You may need to investigate a budget error or view available funds for a specific budget. You can use the **Budget Detail** inquiry pages to view the details of a specific budget. **NOTE**: Only authorized users can view the **Budget Detail** inquiry page.

After completing this topic, you will be able to:

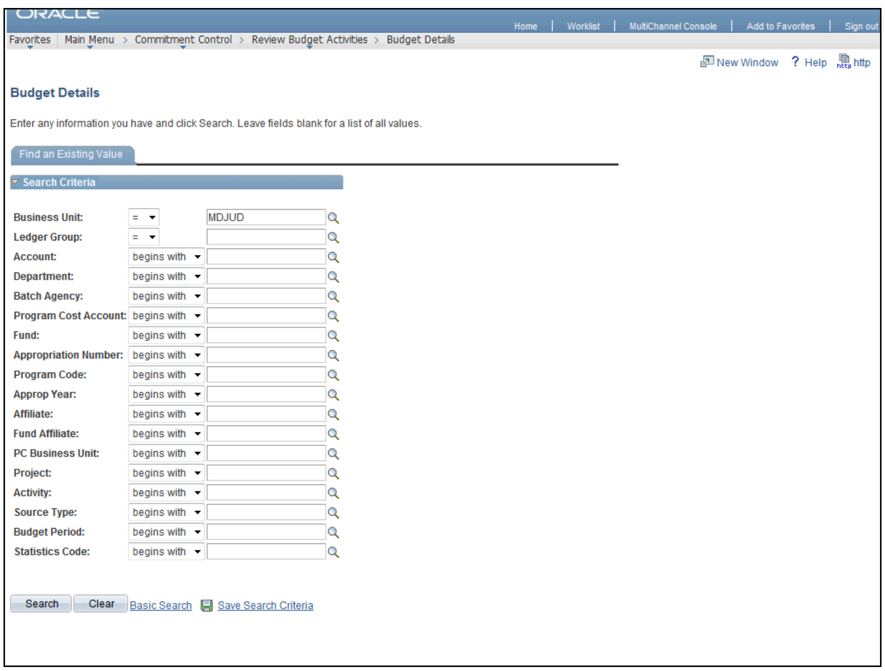
- search for a specific budget using the **Budget Details** search page

- view available funds for a specific account (sub-object class)

**Procedure**

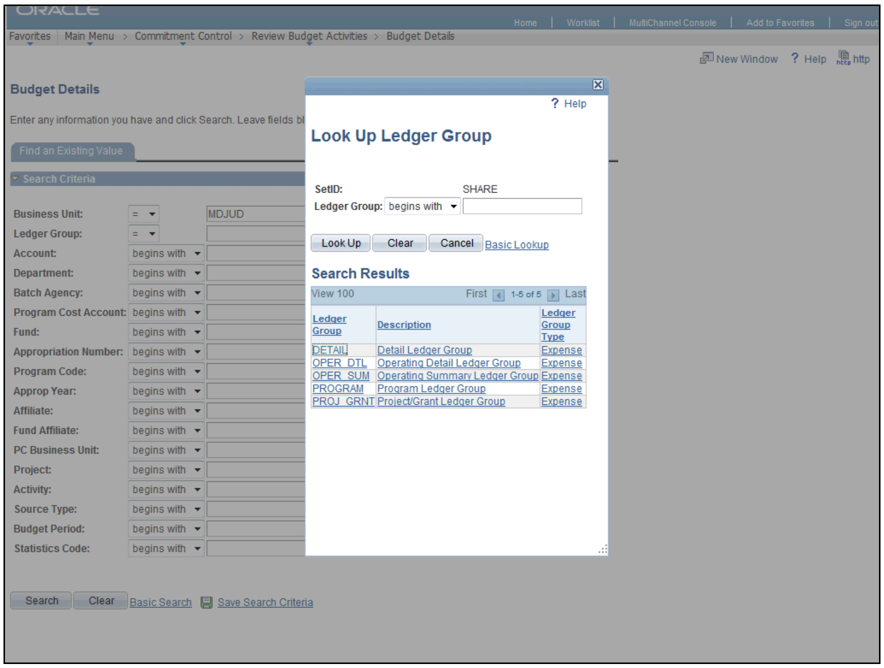
In this topic, you will learn how to use the **Budget Detail** inquiry pages to perform a funds availability check.

| Step | Action |
|---|---|
| 1. | Scroll down to the **Commitment Control** link. |
| 2. | Click the **Commitment Control** link.<br>▷ Commitment Control |
| 3. | Click the **Review Budget Activities** link.<br>Review Budget Activities |
| 4. | Click the **Budget Details** link.<br>Budget Details |

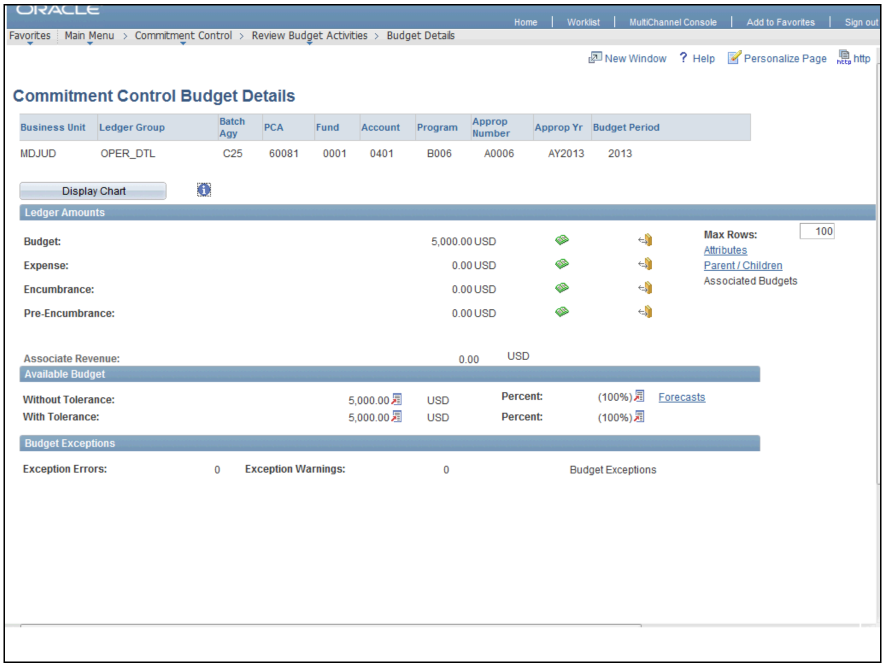



| Step | Action |
|---|---|
| 5. | The **Budget Details - Find an Existing Value** page displays.<br><br>Use this page to enter criteria and search for the budget you want to view. |

| Step | Action |
|---|---|
| 6. | Make sure that the **Business Unit** field has "MDJUD". If it does not, enter it in the field.<br><br>Click the **Look up Ledger Group** button.<br> |




| Step | Action |
|---|---|
| 7. | The **Look Up Ledger Group** page displays.<br><br>Use this page to search for the desired ledger group. |
| 8. | Click the **OPER_DTL** link.<br>OPER_DTL |
| 9. | Enter the applicable Chartfields for the budget you want to view.<br><br>For example, enter the **Batch Agency**, **Account** (sub-object), **Program Cost Account,** and **Fund.** |
| 10. | Click the **Search** button.<br>Search |




| Step | Action |
|---|---|
| 11. | The **Commitment Control Budget Details** page displays for the budget specified.<br><br>The available balance to spend displays in the **Available Budget** section at the bottom of the page. |
| 12. | You have successfully completed the *Verifying Funds Availability* topic.<br><br>You have learned to:<br>- Use the Budget Details search page to find a budget<br>- View the available funds for a budget<br>**End of Procedure.** |

## 1.2 Creating Requisition for a Catalog Item

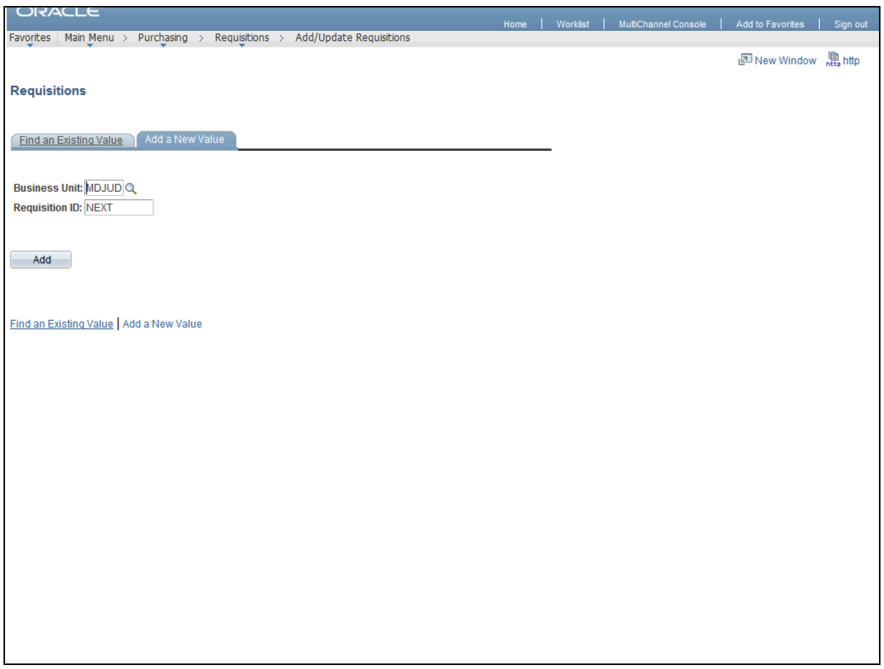
After completing this topic, you will be able to:

- Create a requisition from catalog with multiple lines

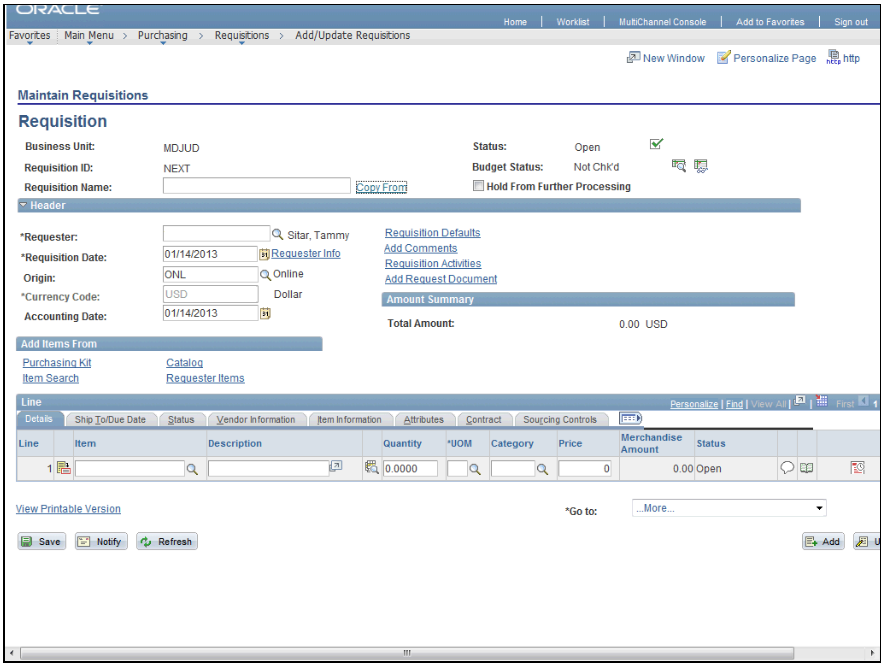
**Procedure**

In this topic, you will create a requisition using an Item catalog.

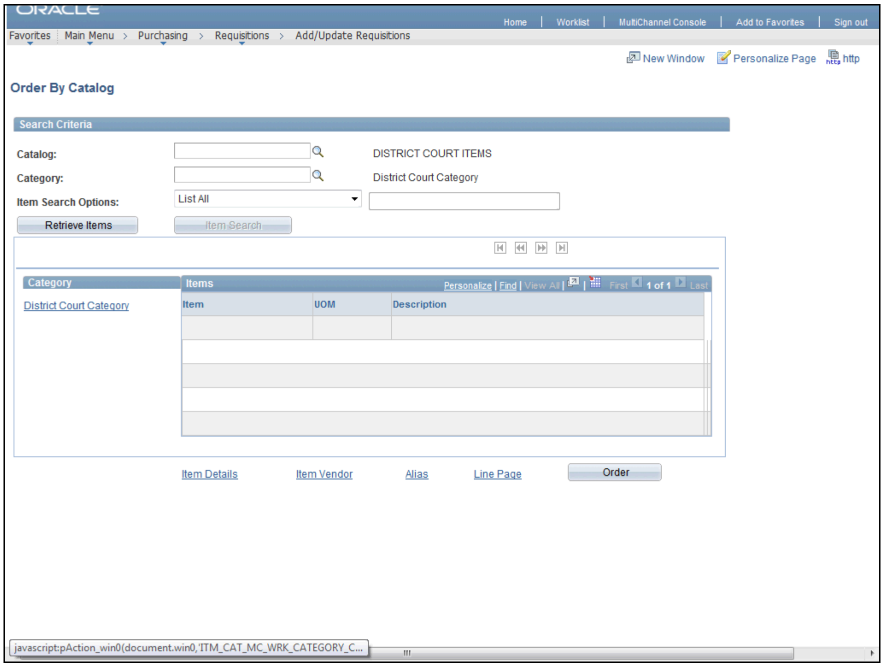
| Step | Action |
|---|---|
| 1. | Navigate to the **Requisitions** page.<br><br>Click the **Purchasing** link.<br>▷ Purchasing |
| 2. | Click the **Requisitions** link.<br>Requisitions |
| 3. | Click the **Add/Update Requisitions** link.<br>Add/Update Requisitions |



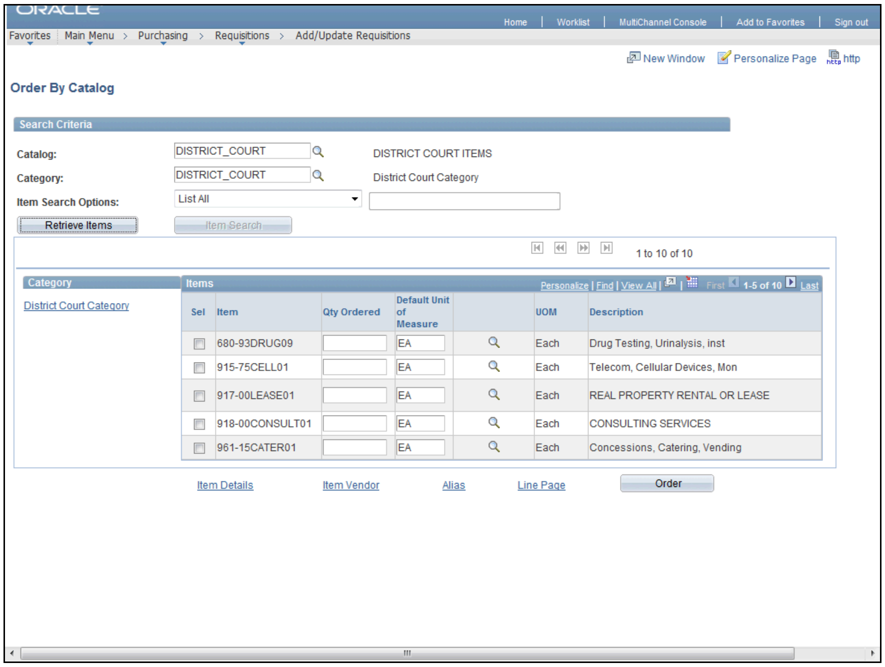

| Step | Action |
|---|---|
| 4. | The **Requisitions** search page displays.<br><br>Verify that the Business Unit and Requisition ID fields are populated correctly.<br><br>Click the **Add** button.<br>Add |

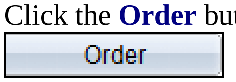


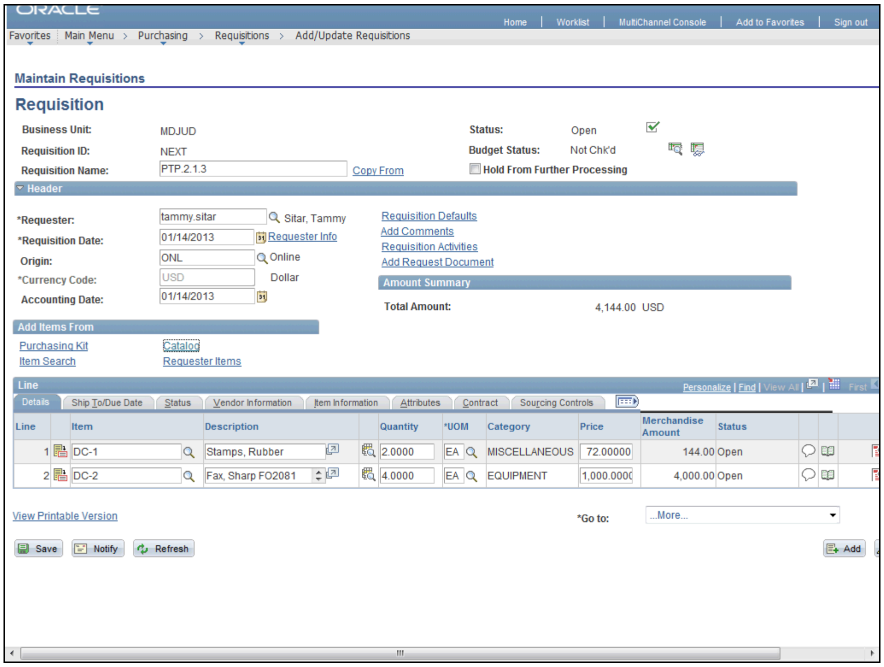

| Step | Action |
|---|---|
| 5. | The **Requisition - Maintain Requisitions** page displays.<br><br>Enter a valid value e.g. "**PTP.2.1.3**" into the **Requisition Name** field. |
| 6. | Enter the desired information into the **Requester** field. Enter a valid value e.g. "**tammy.sitar**". |
| 7. | Click the **Catalog** link.<br>Catalog |

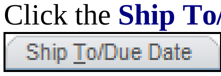
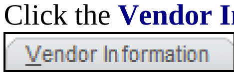


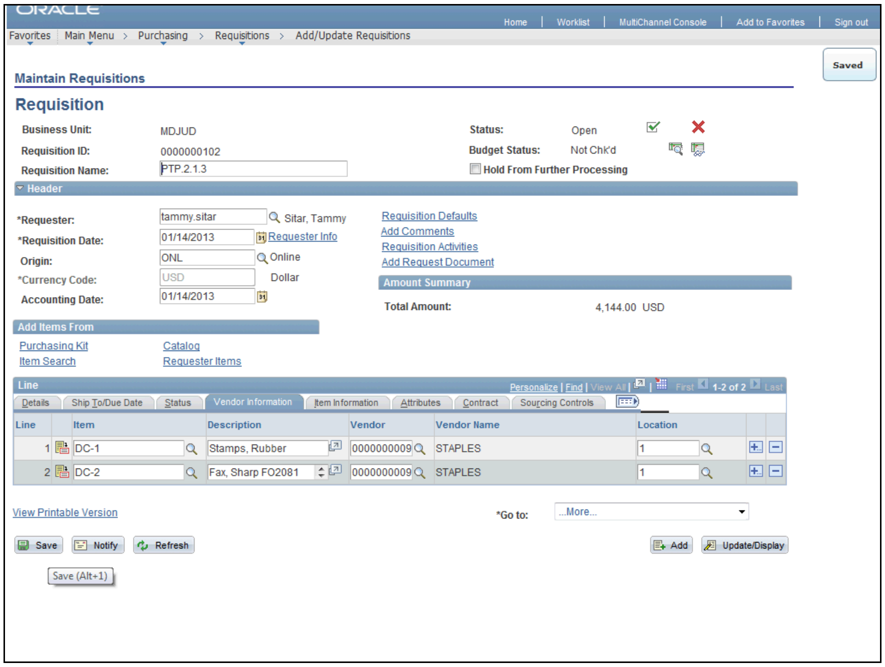

| Step | Action |
|---|---|
| 8. | The **Order by Catalog** page displays.<br><br>Enter the desired information into the **Catalog** field. Enter a valid value e.g. "**DISTRICT_COURT**". |
| 9. | Enter the desired information into the **Category** field. Enter a valid value e.g. "**DISTRICT_COURT**". |
| 10. | Click the **Retrieve Items** button.<br><br> |




| Step | Action |
|---|---|
| 11. | Click the **View All** link.<br><br> |
| 12. | Enter the desired information into the **Qty Ordered** field. Enter a valid value e.g. "**2**". |
| 13. | Enter the desired information into the **Qty Ordered** field. Enter a valid value e.g. "**4**". |
| 14. | Verify that the **Sel** Checkbox is checked for both items.<br><br>Click the **Order** button to order the line items you have selected.<br><br> |




| Step | Action |
|---|---|
| 15. | The **Requisition** page displays.<br><br>Click the **Ship To/Due Date** tab.<br> |
| 16. | Enter the desired information into the **Due Date** field. Enter a valid value e.g. "**2/28/2013**". |
| 17. | Enter the desired information into the **Due Date** field. Enter a valid value e.g. "**2/28/2013**".<br><br>The date entered should be in the future. |
| 18. | Enter the desired information into the **Ship To** field. Enter a valid value e.g. "**02**" for line 1 (if not already defaulted). |
| 19. | Enter the desired information into the **Ship To** field. Enter a valid value e.g. "**02**" for line 2 (if not already defaulted). |
| 20. | Click the **Vendor Information** tab.<br> |
| 21. | Enter the desired information into the **Vendor** field. Enter a valid value e.g. "**0000000009**", (Staples) for line 2. |
| 22. | Click the **Save** button.<br> |




| Step | Action |
|---|---|
| 23. | You have successfully completed the *Creating Requisition for a Catalog Item - multiple line items* topic.<br><br>You have learned how to:<br>- Enter a requisition for multiple line items.<br>**End of Procedure.** |

## 1.3 Applying Requisitions Defaults to a Requisition

In GEARS, you can enter line, schedule, and distribution (accounting) information on multiple lines of a requisition at one time when the same information is needed on each line. For example, if you needed to use the same **PCA** and **Account** for all lines on a requisition, you only have to enter it once.

Defaults for the requisition line, schedule, and distribution (accounting) are entered on the **Requisition Defaults** page. **NOTE:** You must enter at least one line on the requisition before applying defaults.

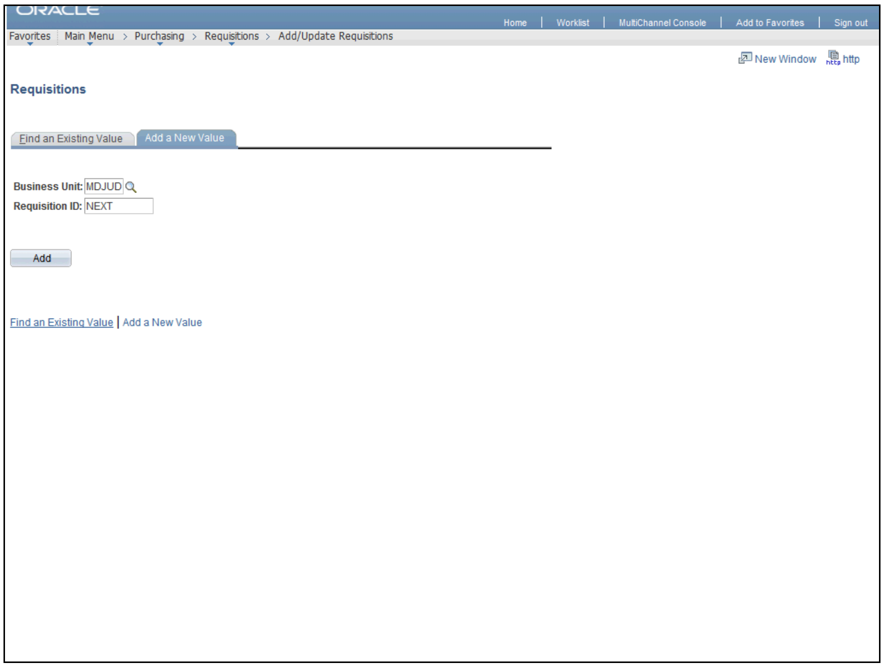
After completing this topic, you will be able to:

- Use the requisition Defaults page to apply requisition defaults to a requisition

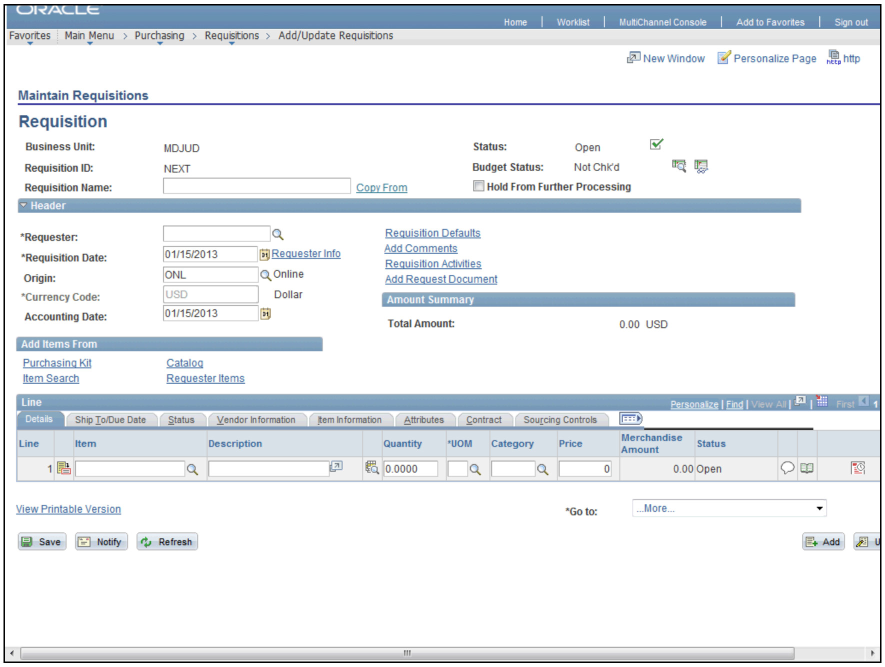
**Procedure**

In this topic, you will apply requisition defaults to a requisition.

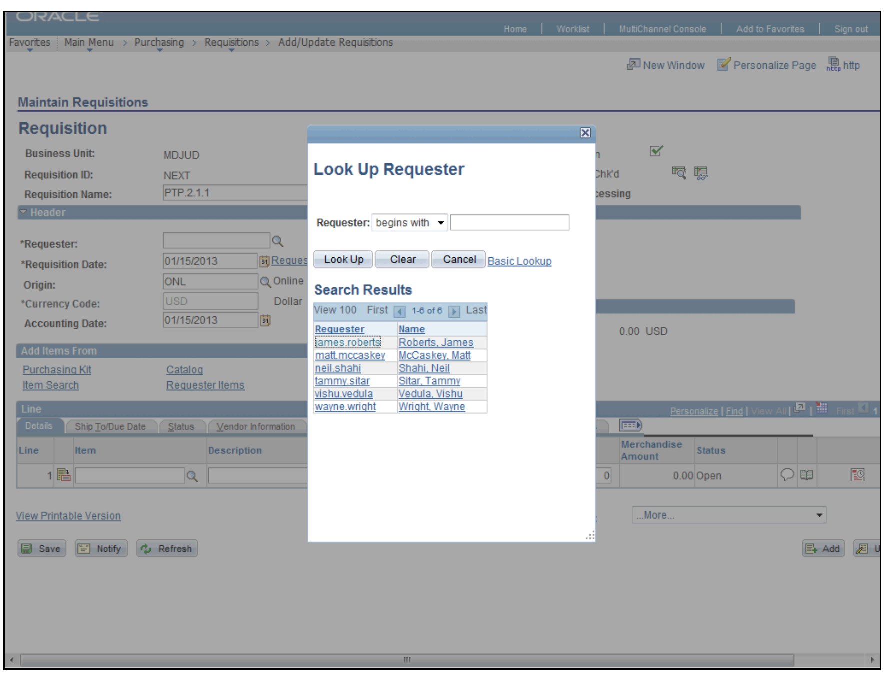
| Step | Action |
|---|---|
| 1. | Navigate to the **Requisitions** page.<br><br>Click the **Purchasing** link.<br>Purchasing |
| 2. | Click the **Requisitions** link.<br>Requisitions |
| 3. | Click the **Add/Update Requisitions** link.<br>Add/Update Requisitions |



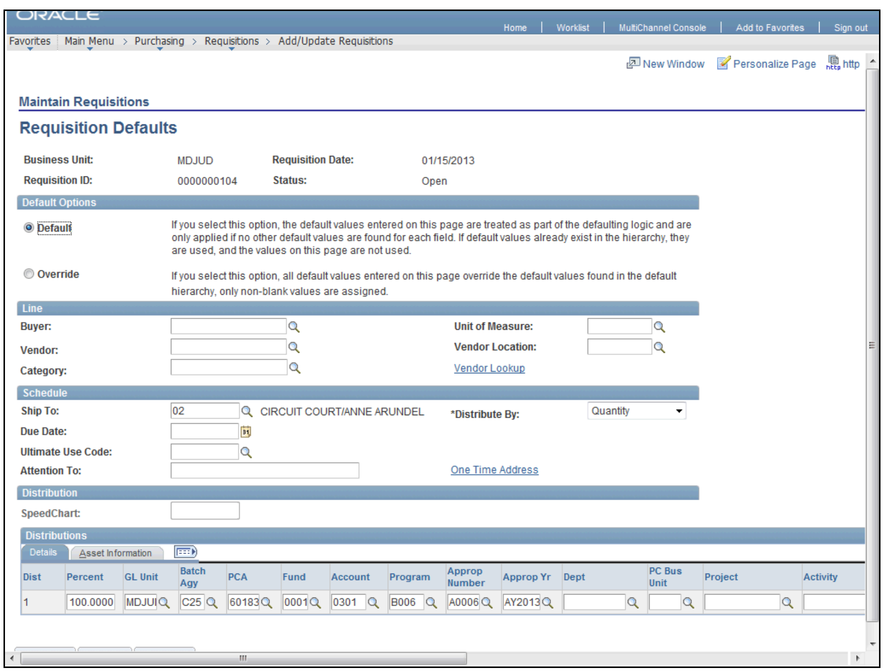

| Step | Action |
|---|---|
| 4. | The **Requisitions** search page displays.<br><br>Verify that the **Business Unit** field displays "MDJUD" and the **Requisition ID** field displays "NEXT". |
| 5. | Click the **Add** button.<br>Add |



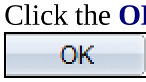
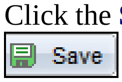

| Step | Action |
|---|---|
| 6. | The **Requisition** page displays.<br><br>Enter the desired information into the **Requisition Name** field, if desired. |
| 7. | Click the **Look up Requester (Alt+5)** button. |



| Step | Action |
| --- | --- |
| 8. | The **Look Up Requester** page displays.<br><br>Click an appropriate requester link.<br>tammy.sitar |
| 9. | Enter the desired information into the **Item** field. |
| 10. | Enter the line quantity into the **Quantity** field. |
| 11. | **NOTE:** If the **Description**, **UOM** and **Category** fields are not already populated, they will be populated when you click the **Save** button.<br><br>Click the **Save** button.<br>Save |
| 12. | Once you have entered information for one line, you can apply defaults for the requisition.<br><br>Click the **Requisition Defaults** link.<br>Requisition Defaults |




| Step | Action |
| --- | --- |
| 13. | The **Requisition Defaults** page displays.<br><br>Use the **Requisition Defaults** to enter line, schedule, or distribution values that will be applied to the requisition. |

| Step | Action |
|---|---|
| 14. | In the **Default Options** section, use the Override option to override the default values entered in a field for the entries that you make on this page.<br><br>Overrides only apply to the fields entered, i.e., only non-blank values are assigned on the requisition.<br><br>Click the **Override** option.<br>  |
| 15. | Enter line, schedule or distribution  default values to apply to the requisition. |
| 16. | Click the **OK** button when you are finished.<br>  |
| 17. | The **Retrofit field changes** page displays.<br><br>Values entered on the Requisition **Defaults** page are listed in the **Retrofit Field Selection** section.<br><br>Review and confirm the values. |
| 18. | Click the **Mark All** link to select all values you nat to apply to the requisition.<br>  |
| 19. | The "Apply" check box is marked for all rows/values.<br><br>Click the **OK** button.<br>  |
| 20. | The **Requisitions** page displays.<br>Review line/schedule/distribution updates to verify that the defaults were applied, if desired. |
| 21. | Click the **Save** button to save updates.<br>  |
| 22. | Click the **Approve** button.<br> |
| 23. | The system changes the **Status** to "Approved".<br><br>Click the **Budget Check** button.<br> |
| 24. | The **Budget Status**  now "Valid", |
| 25. | You have successfully completed the *Applying Requisitions Defaults to a Requisition* topic.<br><br>You have learned how to:<br>- Apply defaults to a requisition<br>**End of Procedure.** |

# Lesson 2: Canceling Requisitions

**Lesson Overview**

There may be a need to cancel a requisition in ICFS. Once a requisition has been canceled, you can use the budget checking process to remove any pre-encumbered funds from the budget. This action releases the reserved funds so they can be used for other requests.

**Considerations**

- If a requisition is sourced to an obligation, you must cancel the obligation before canceling the requisition.
- If a budget status of "Valid" exists on a requisition prior to cancellation, you must budget check the requisition to return committed funds to the funding source.
- If a requisition is canceled in error, you should create a new requisition.
- A cancelled requisition cannot be updated. It can be viewed from the **Requisition** inquiry pages after cancellation.

**Lesson Objectives**

After completing this lesson, you will be able to:

- Cancel a requisition from the **Requisition** entry page
- Return funds to the funding source used on the cancelled requisition when necessary

## 2.1 Canceling an Unsourced and Unapproved Requisition

After the completing this topic, you will be able to:

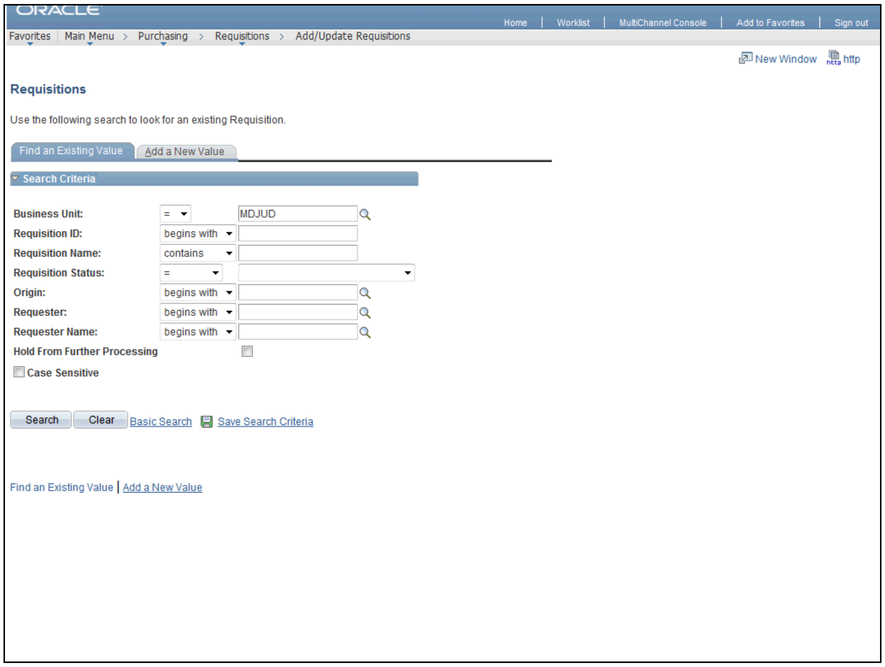
- Cancel a requisition that has not been approved or budget checked

**Procedure**

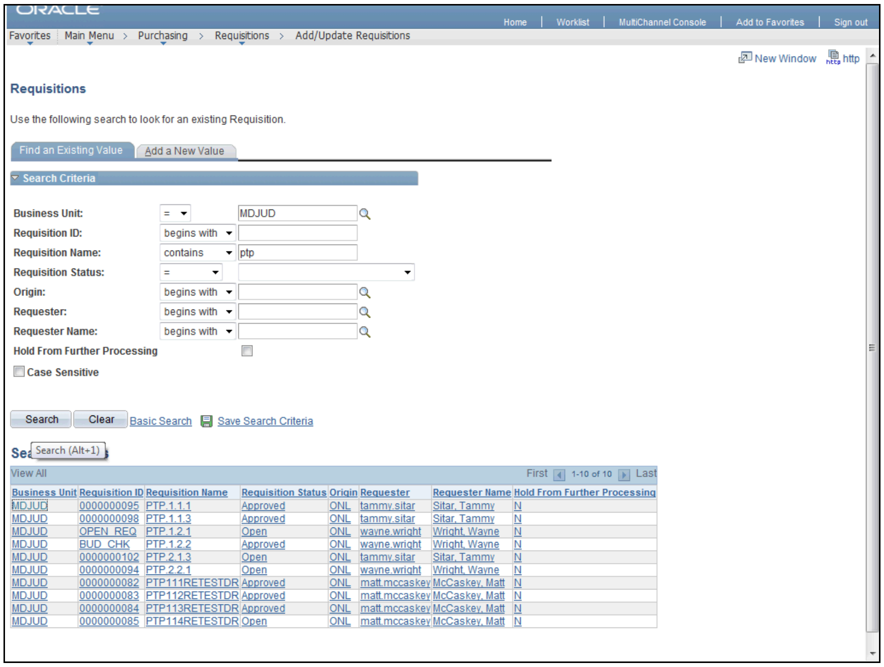
In this topic, you will cancel an unsourced, unapproved requisition.

| Step | Action |
|---|---|
| 1. | Navigate to the **Requisitions** page.<br><br>Click the **Purchasing** link.<br>▷ Purchasing |
| 2. | Click the **Requisitions** link.<br>Requisitions |
| 3. | Click the **Add/Update Requisitions** link.<br>Add/Update Requisitions |

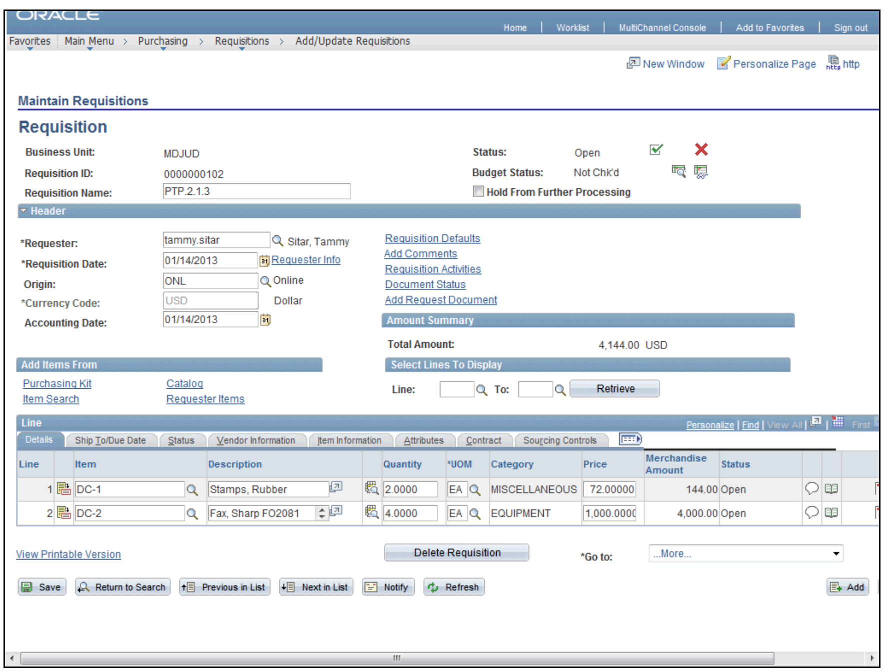
| Step | Action |
|---|---|
| 4. | The **Requisitions** search page displays.<br><br>Click the **Find an Existing Value** link.<br>Find an Existing Value |



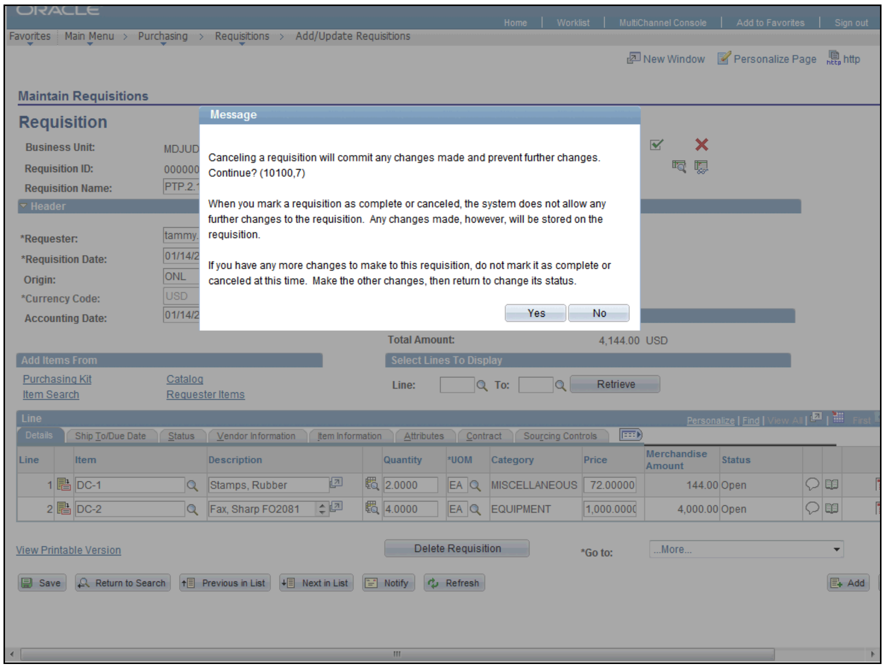

| Step | Action |
|---|---|
| 5. | The **Requisitions - Find an Existing Value** page displays.<br><br>You will need to search for a requisition that has already been created.<br><br>Enter a valid value e.g. "**ptp**" into the **Requisition Name** field. |
| 6. | Click the **Search** button.<br>Search |

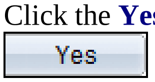


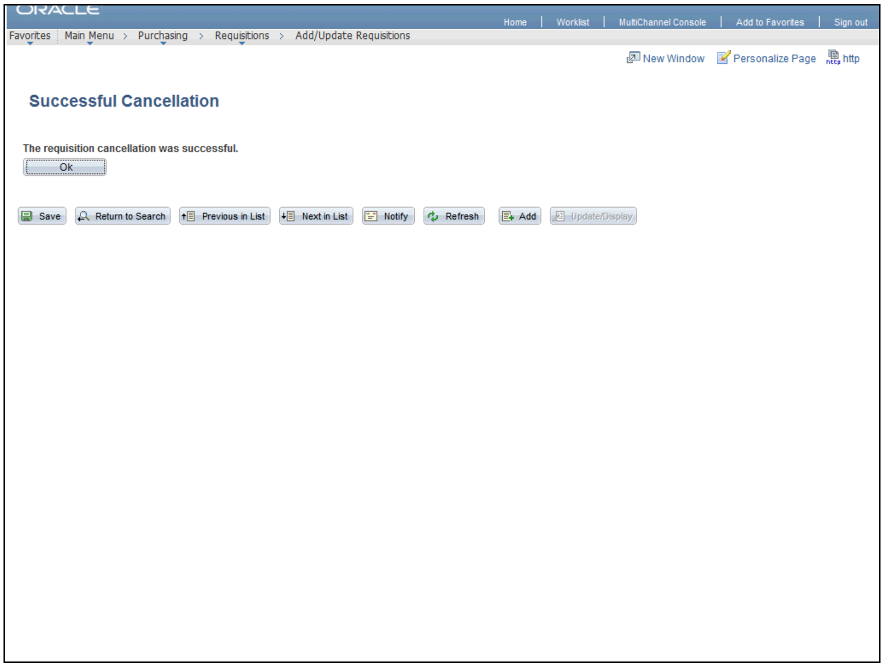

| Step | Action |
|---|---|
| 7. | Click the appropriate link. In this example, **PTP.2.1.3** is selected, (this is the requisition created previously).<br>PTP.2.1.3 |

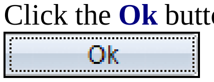


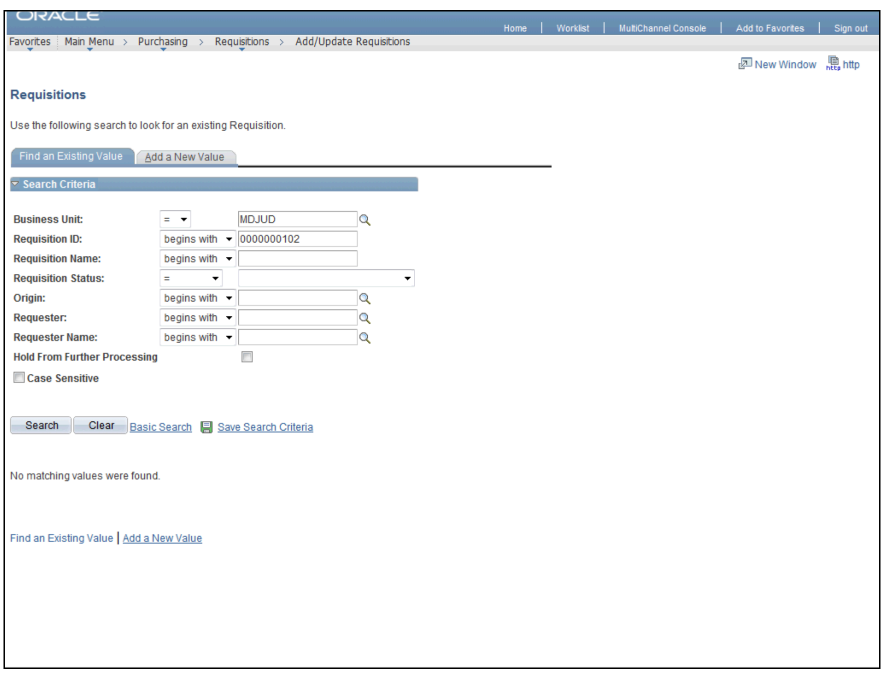
| Step | Action |
|---|---|
| 8. | The **Requisitions - Maintain Requisitions** page displays.<br><br>Verify that the Status of the selected requisition is "Open" and the Budget Status is "Not Chk'd" before proceeding to cancel it. |
| 9. | Click the Cancel (red 'x') icon to cancel the requisition.<br> |




| Step | Action |
|---|---|
| 10. | Review the message.<br><br>Click the **Yes** button.<br> |




| Step | Action |
|---|---|
| 11. | The **Successful Cancellation** page displays to confirm that the requisition was cancelled.<br><br>Click the **Ok** button.<br> |



| Step | Action |
|---|---|
| 12. | You have successfully completed the *Canceling an Unsourced and Unapproved Requisition* topic.<br><br>You have learned how to:<br>- Cancel an unsourced, unapproved requisition.<br>**End of Procedure.** |

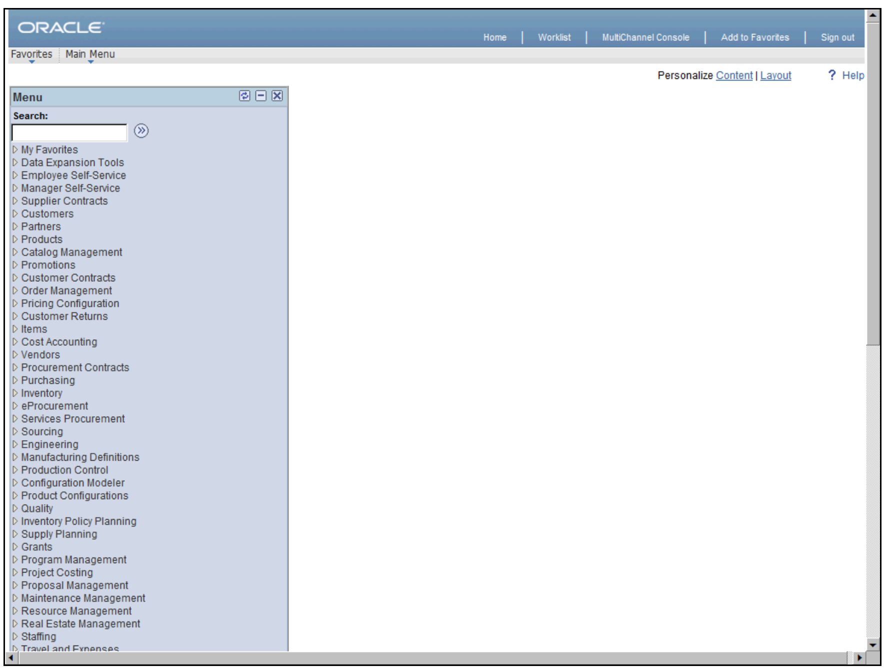
## 2.2 Canceling a Sourced Requisition

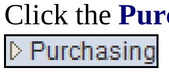
After completing this topic, you will be able to:

- Cancel a requisition that does not have an associated purchase order
- Return money to the budget after cancelation

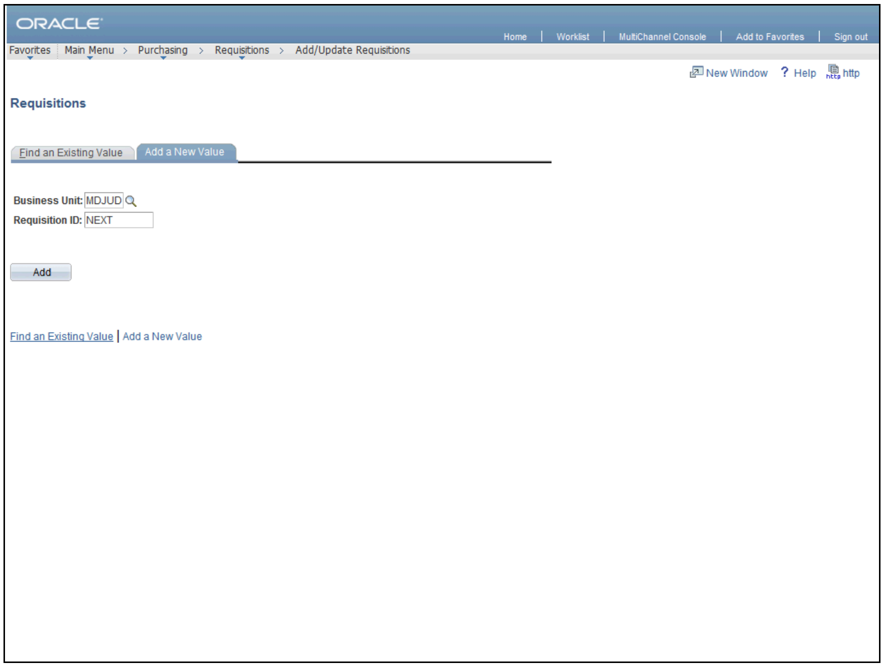
**Procedure**

In this topic, you will cancel a requisition that was sourced to a PO, cancel the PO, and return money to the requisition.

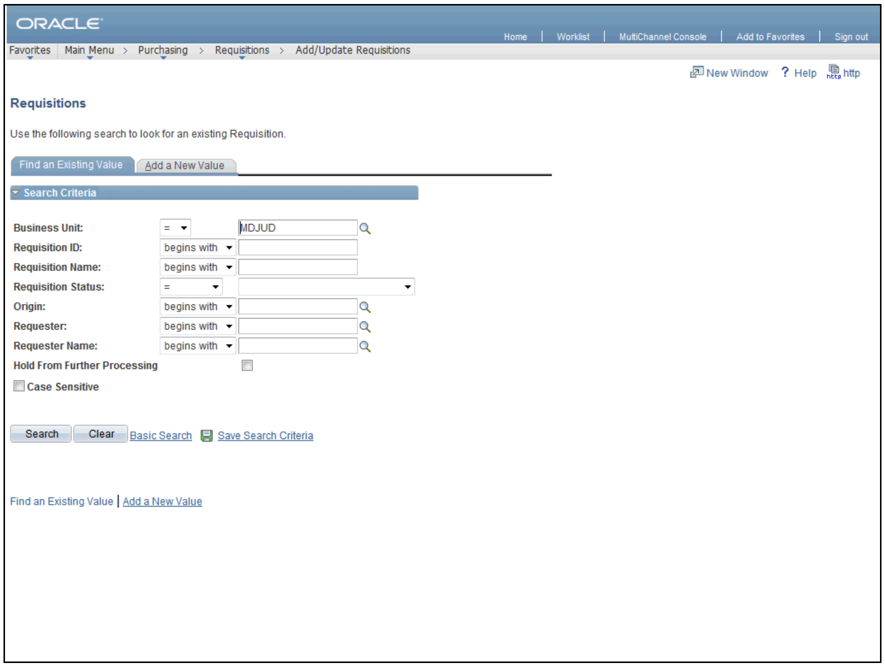


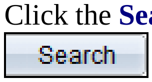

| Step | Action |
|---|---|
| 1. | Navigate to the **Requisitions** page.<br><br>Click the **Purchasing** link.<br> |

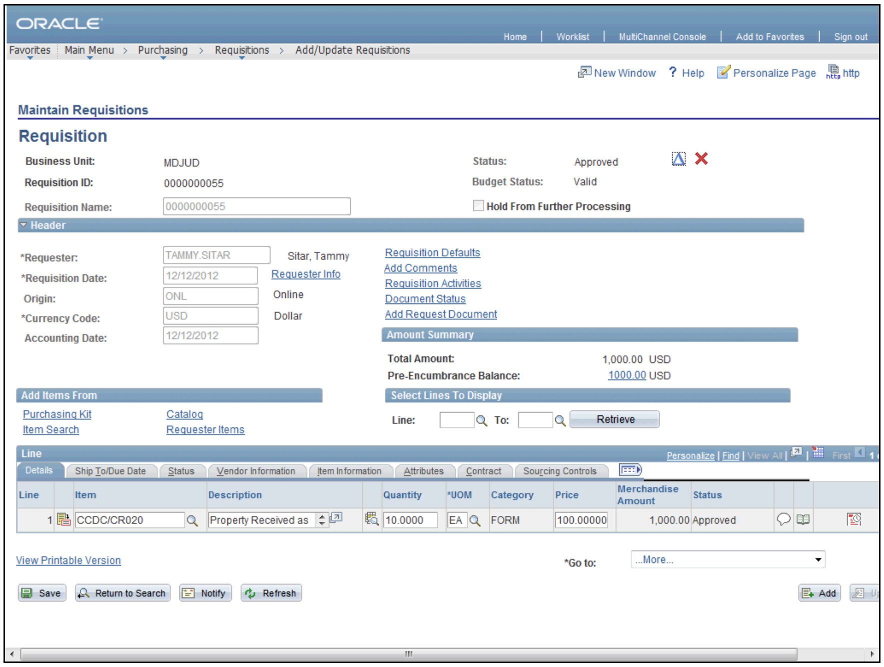
| Step | Action |
|---|---|
| 2. | Click the **Add/Update Requisitions** link.<br>Add/Update Requisitions |



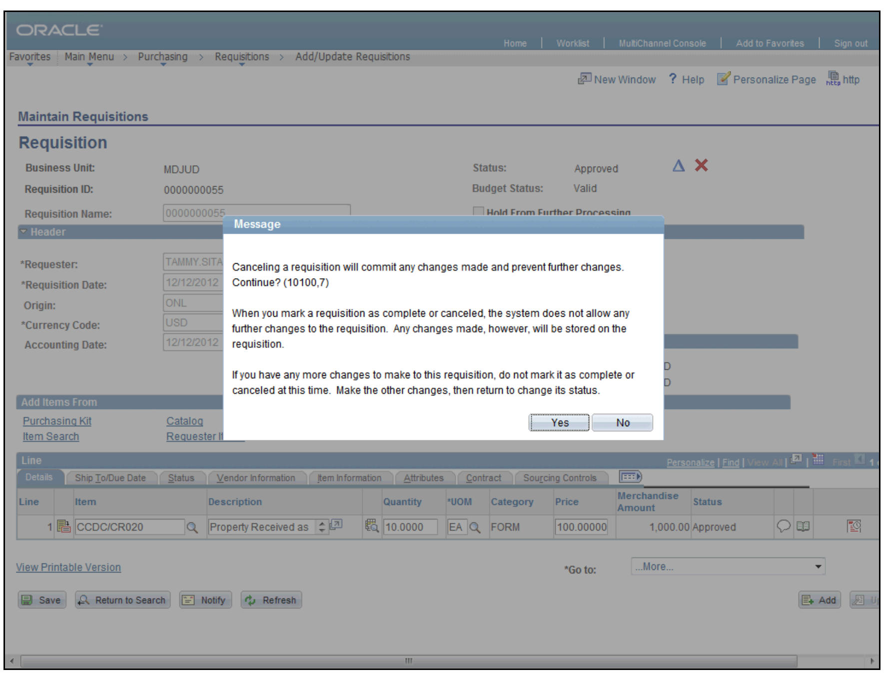

| Step | Action |
|---|---|
| 3. | The **Requisitions** search page displays.<br><br>Click the **Find an Existing Value** tab.<br>Find an Existing Value |



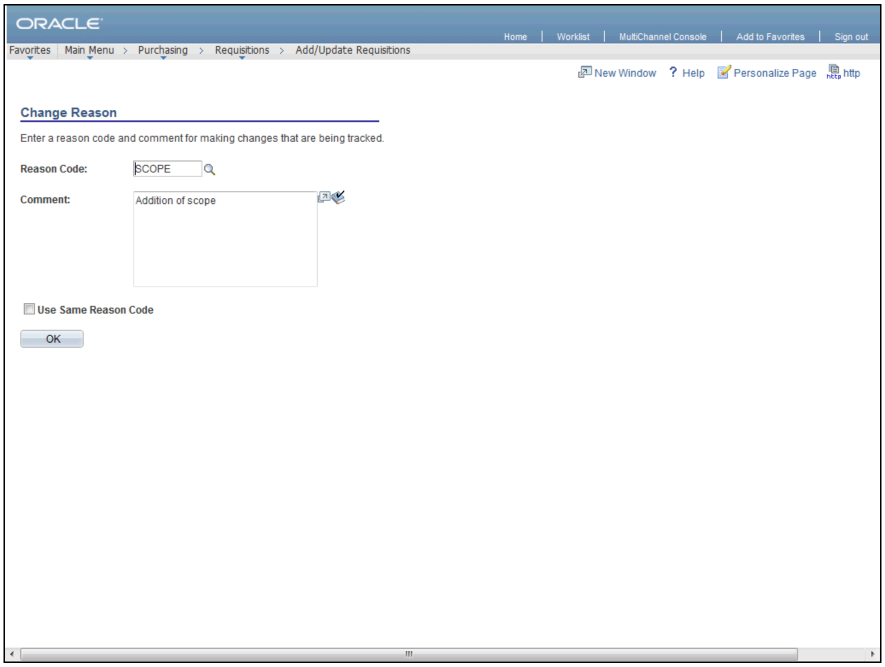

| Step | Action |
|---|---|
| 4. | The **Find an Existing Value** page displays.<br><br>Enter the desired information into the **Requisition ID** field.<br><br>This should be the requisition created earlier in this topic, example: "**0000000055**". |
| 5. | Click the **Search** button.<br> |

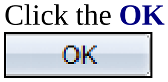


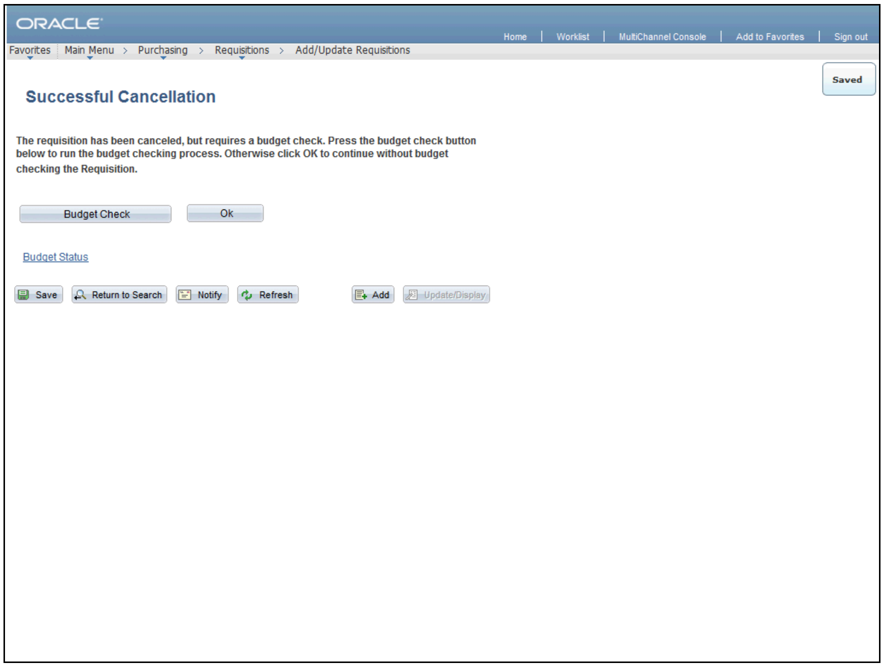

| Step | Action |
|---|---|
| 6. | The **Requisition** page displays.<br><br>Click the **Cancel** button. |



| Step | Action |
|---|---|
| 7. | Click the **Yes** button.  |




| Step | Action |
|---|---|
| 8. | The **Change Reason** page displays.<br><br>Enter a reason code into the reason code box and any explanatory comments that you want to make into the Comment box.<br><br>Click the **OK** button.  |




| Step | Action |
|---|---|
| 9. | The **Successful Cancellation** page displays.<br><br>A successful budget check returns the funds to the available budget.<br><br>Click the **Budget Check** button.<br><br> |
| 10. | You have successfully completed the *Canceling a Sourced Requisition* topic.<br><br>You have learned how to:<br>- Cancel a requisition after the associated purchase order had been cancelled or cancelled<br>- Return pre-encumbered funds to the associated budget using the budget checking process<br>**End of Procedure.** |

## 2.3 Canceling a Requisition Line

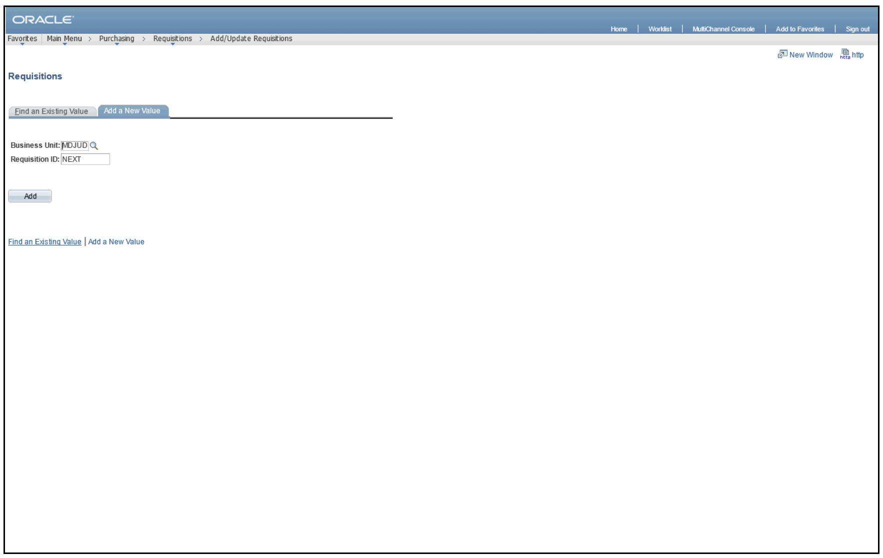
After completing this topic, you will be able to:

- Cancel a requisition line that has been budget checked
- Return money to the budget after cancelation

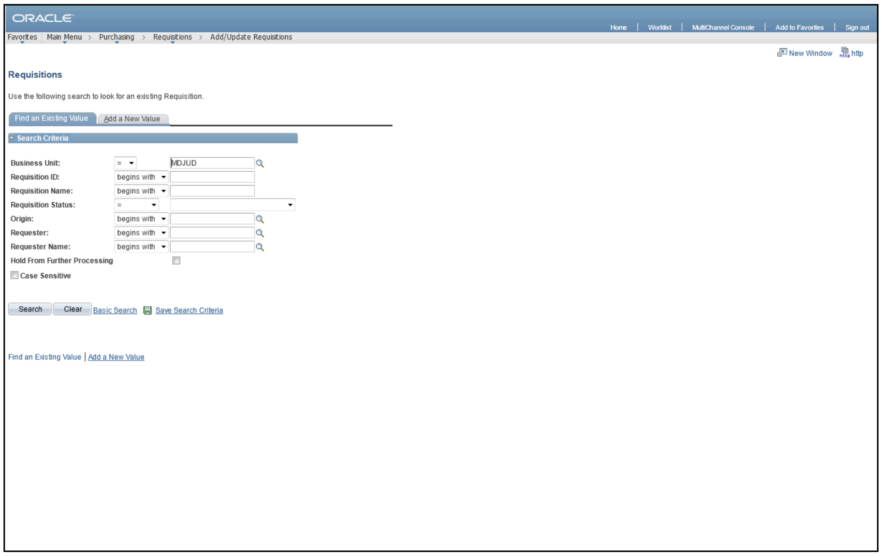
**Procedure**

In this topic, you will cancel a requisition line that has not been sourced to a purchase order. You will also return pre-encumbered funds for the requisition line amount back to the associated budget.

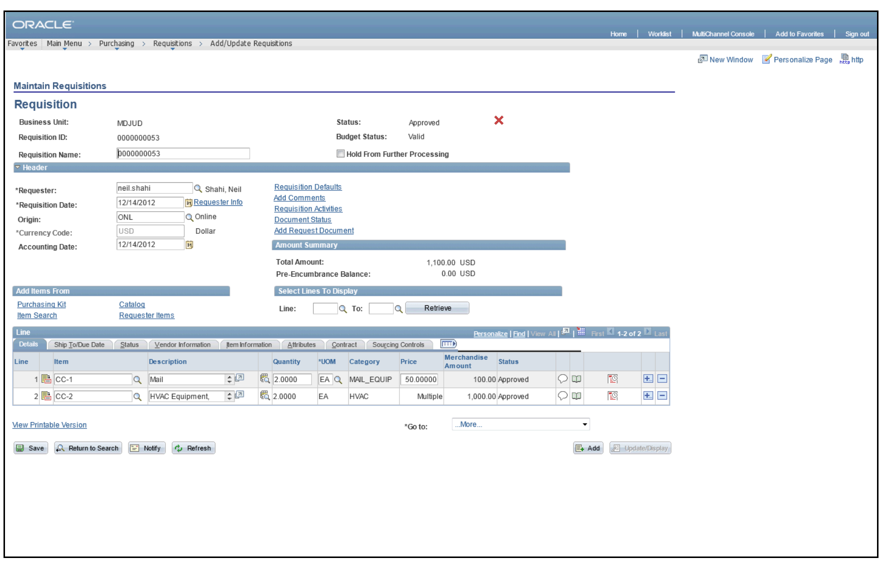
| Step | Action |
|---|---|
| 1. | Navigate to the **Requisition** page.<br><br>Click the **Purchasing** link.<br>Purchasing |
| 2. | Click the **Add/Update Requisitions** link.<br>Add/Update Requisitions |



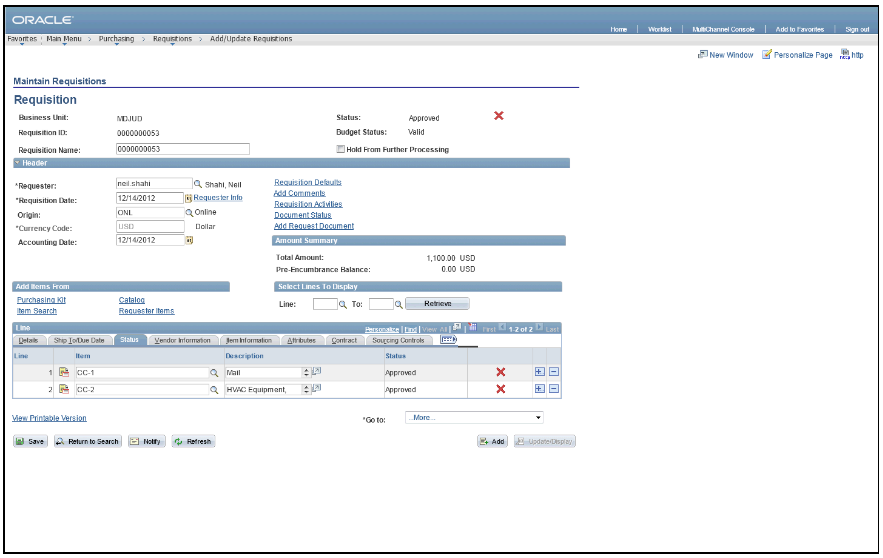

| Step | Action |
|---|---|
| 3. | The **Requisitions** search page displays.<br><br>Click the **Find an Existing Value** tab.<br>Find an Existing Value |



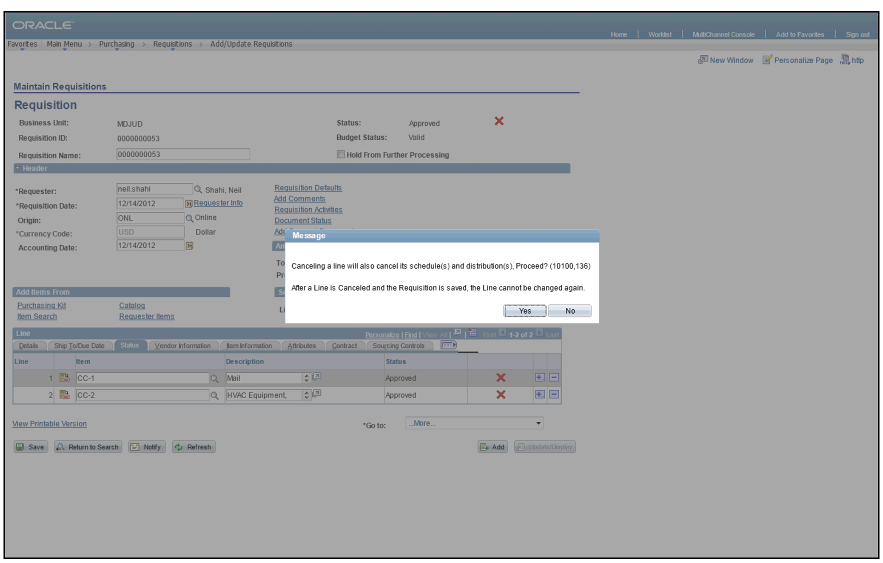
| Step | Action |
|---|---|
| 4. | The **Find an Existing Value** tab displays.<br><br>Enter the desired information into the **Requisition ID** field. Enter a previously created valid value e.g. "**0000000053**". |
| 5. | Click the **Search** button.<br><br>**Note:** Once you enter the full Requisition ID above, you will be directed to the Requisition page for that req.<br> |



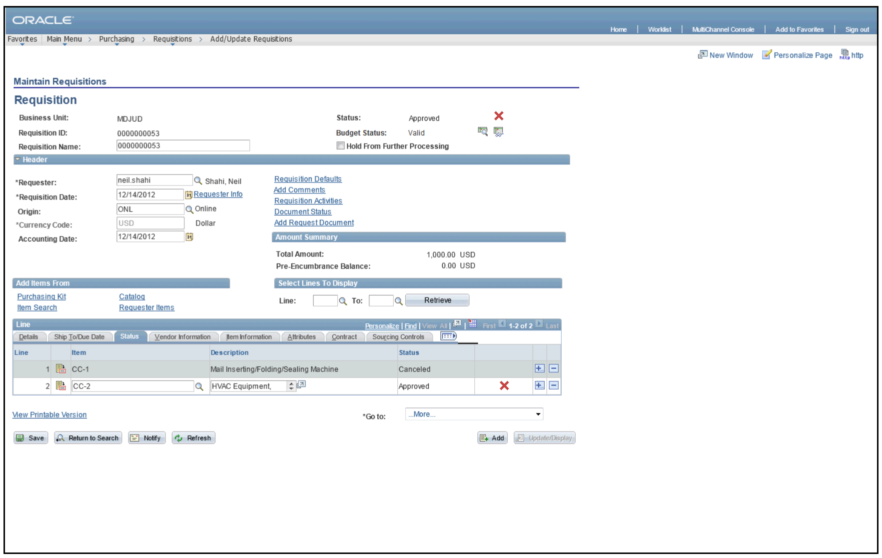
| Step | Action |
|---|---|
| 6. | The **Requisition** page displays.<br><br>Click the **Status** tab.<br> |




| Step | Action |
|---|---|
| 7. | Click the **Cancel Line** button for Line 1.<br> |



| Step | Action |
|---|---|
| 8. | Click the **Yes** button.  |
| 9. | Note: The status on the line that you canceled has changed to **'Canceled'.**<br><br>Click the **Save** button.  |
| 10. | Click the **Budget Check** button.<br><br>Validate Budget Status ='Valid' after the budget checking process has completed.  |




| Step | Action |
|---|---|
| 11. | Verify that the Budget Status is **Valid.** |
| 12. | You have successfully completed the *Canceling a Requisition Line* topic.<br><br>You have learned how to:<br>- Cancel a req line<br>**End of Procedure.** |

## Lesson 3: Inquiring on Requisition Information

**Lesson Overview**

In this lesson, you will review how to inquire on requisition information using the **Manage Requisitions** page.

**Lesson Objectives**

After completing this lesson, you will be able to:

- View requisition information in GEARS
- Cross reference transactions associated with a requisition

## 3.1 Reviewing Requisition Information

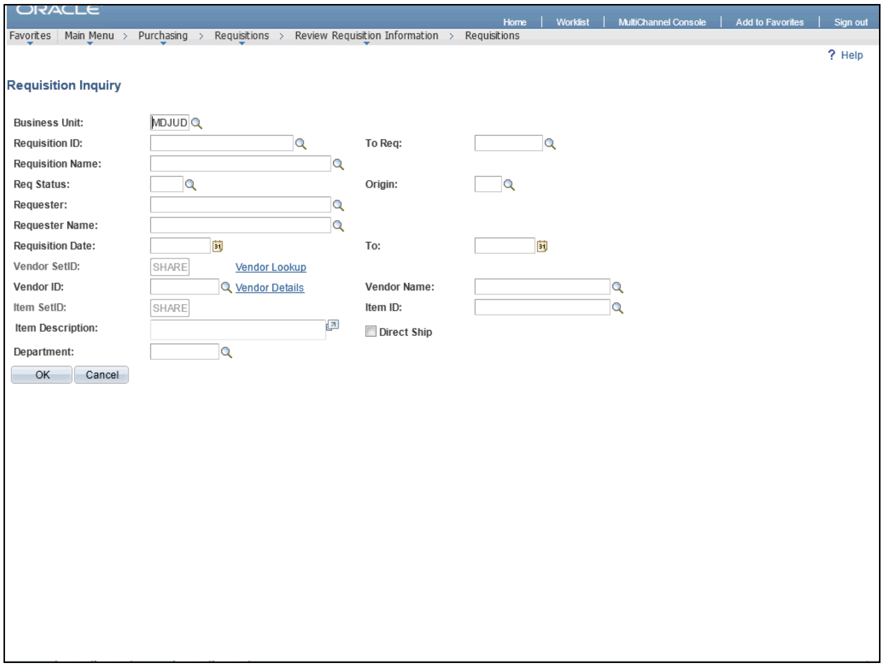
After completing this topic, you will be able to:

- Use search criteria to find an existing requisition
- View requisition information using the **Requisition** inquiry page

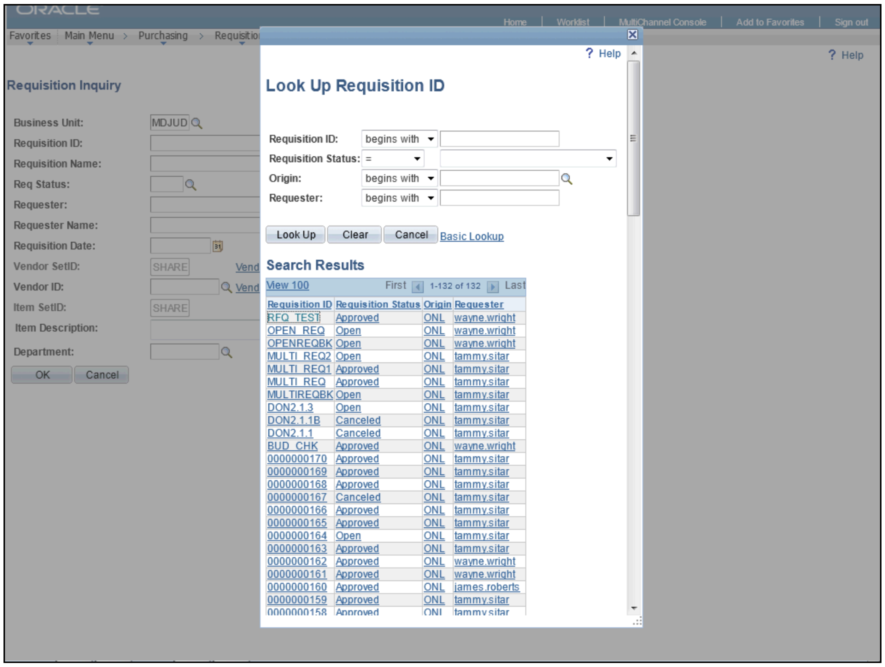
**Procedure**

In this topic, you will learn how to search for a requisition and review the associated information.

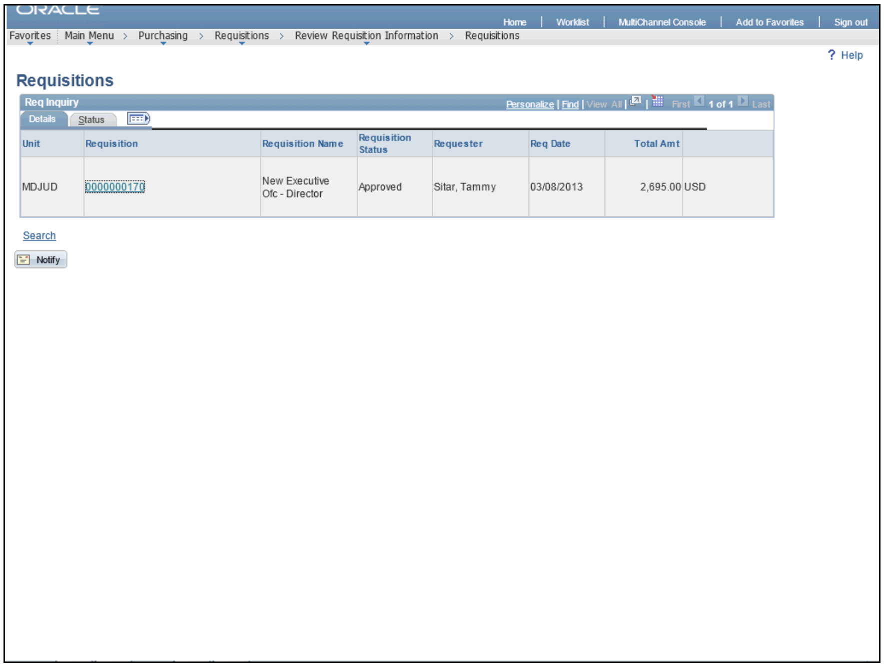
| Step | Action |
|---|---|
| 1. | Begin by navigating to the **Requisitions** page.<br><br>Click the **Purchasing** link.<br>▷ Purchasing |
| 2. | Click the **Requisitions** link.<br>Requisitions |
| 3. | Click the **Review Requisition Information** link.<br>Review Requisition Information |
| 4. | Click the **Requisitions** link.<br>Requisitions |



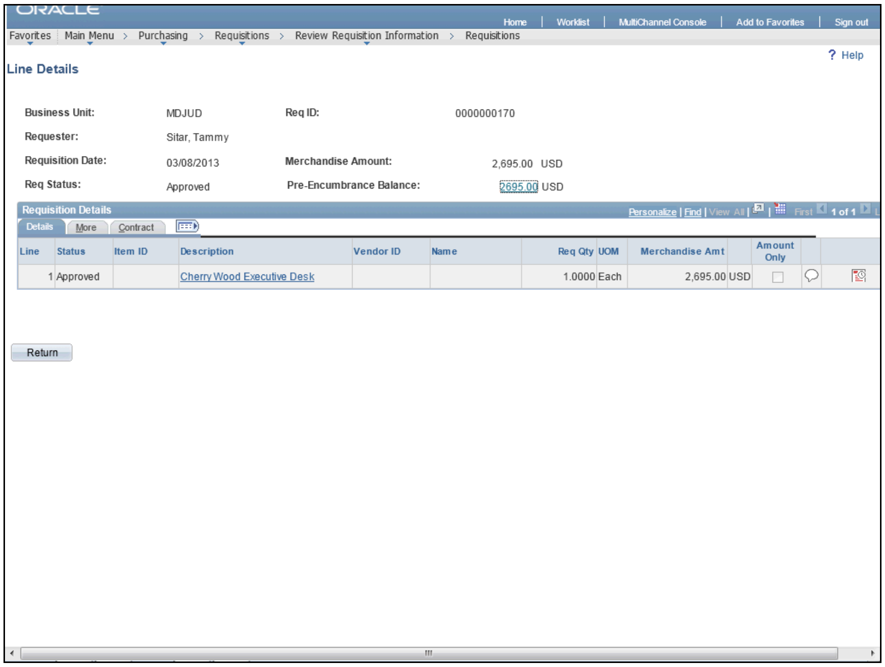

| Step | Action |
|---|---|
| 5. | The **Requisition Inquiry** page displays.<br><br>Various fields are available in which to conduct a search for a requisition. You can search by requisition name, by date, vendor, description, and by the ID. This page is used to enter the criteria needed to execute the search. |
| 6. | For this example the criteria will be the **Requisition ID**.<br><br>Click the **Look up Requisition ID (Alt+5)** button.<br> |



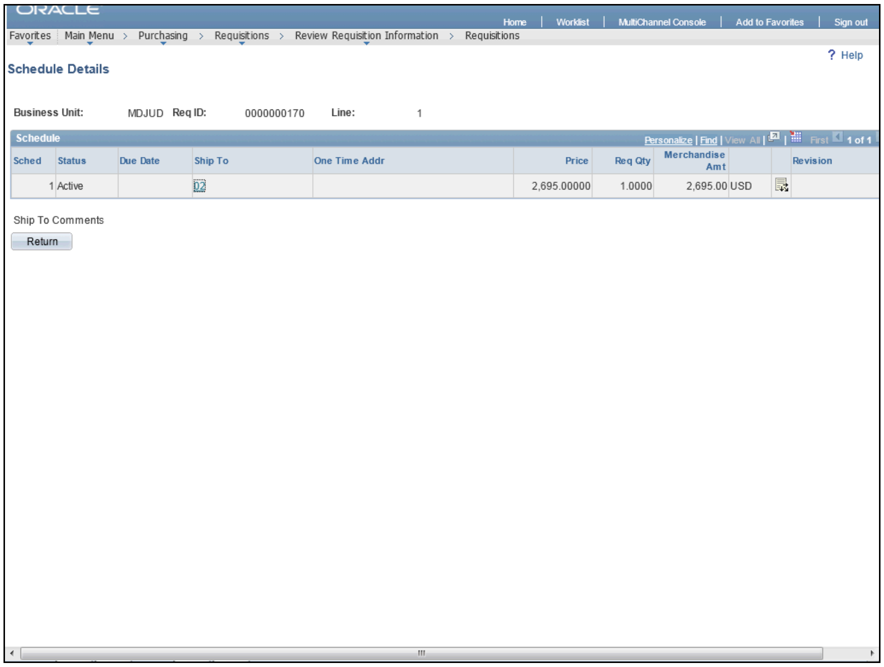

| Step | Action |
|---|---|
| 7. | The **Look Up Requisition ID** page displays.<br><br>If you know the **Requisition ID** enter<br>Click the requisition ID link<br>0000000170 |
| 8. | Click the **OK** button.<br>OK |



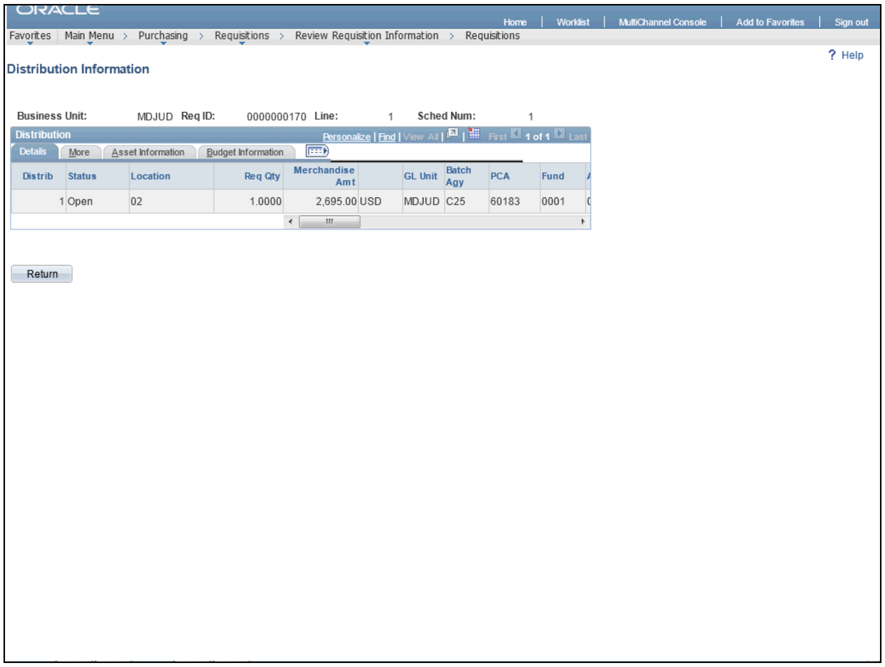

| Step | Action |
|---|---|
| 9. | The **Requisitions** page displays.<br><br>The **Details** and the **Status** of the requisition can now be viewed.<br><br>Take a moment to glance over the information on the **Details** tab. It provides basic information about the name of the requisition, who entered the request, the request date, and its current status. |
| 10. | Click the **0000000170** link.<br>0000000170 |



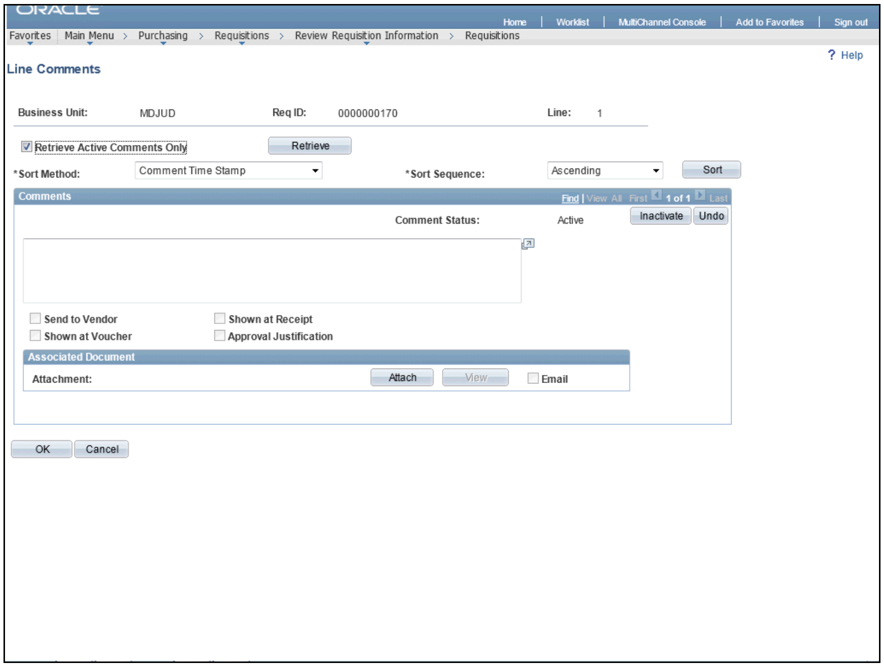

| Step | Action |
|---|---|
| 11. | The **Line Details** of the requisition displays.<br><br>It provides the quantity, amount for each line item, line item details, and the schedule details for the line item. |
| 12. | To view the schedule information, click the **Schedule Details** button.<br> |

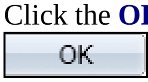


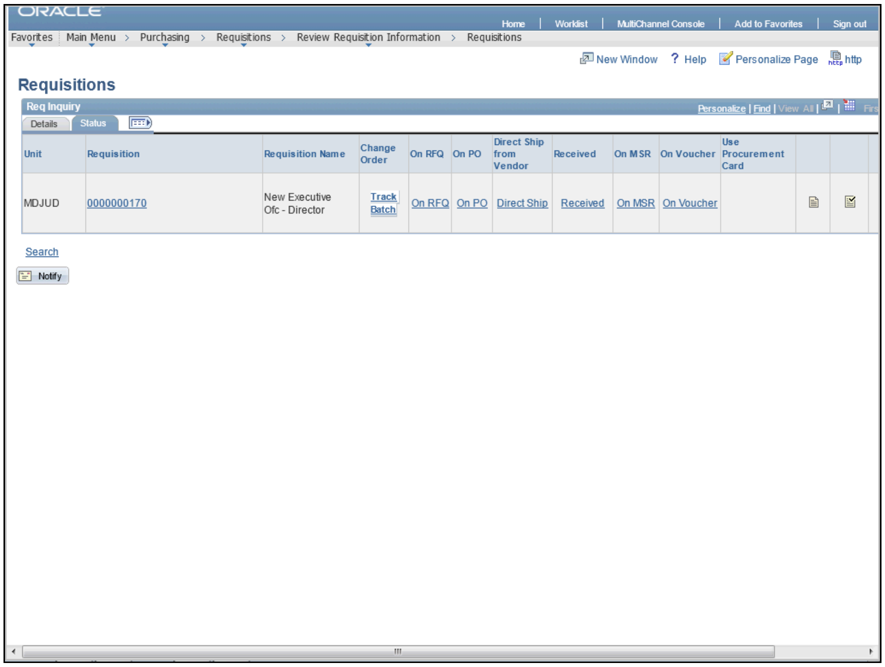

| Step | Action |
|---|---|
| 13. | The **Schedule Details** page displays<br><br>The location of where the item will ship to and the date it is due to arrive at the location can be viewed here. |
| 14. | To view how the funds are distributed to pay for the line item,click the **Distribution Details** button.<br> |



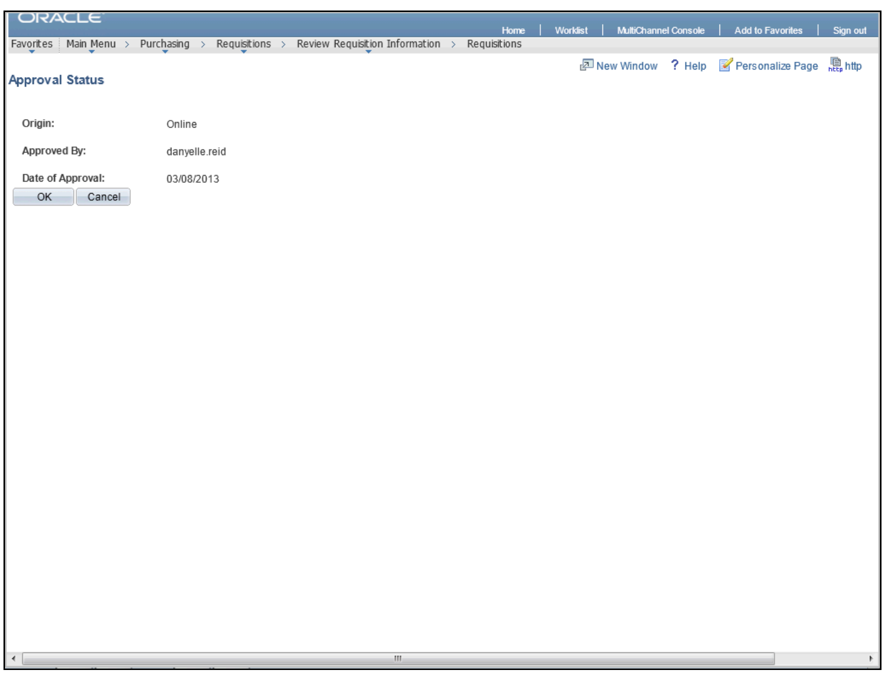

| Step | Action |
|---|---|
| 15. | The **Distribution Details** page displays.<br><br>The **Details** tab displays the funding information (i.e., PCA, Account and other Chartfield information) for the requisition line item. |
| 16. | Brief and general information, such as: Status, requisition quantity, and merchandise amount base, can be found in the **More** tab. |
| 17. | Asset Management information such as the asset Profile ID and tag number (if applicable) display on the **Asset Information** tab. |
| 18. | Review the date that the transaction was posted to the budget ledgers and view the requisition pre-encumbrance balance for the distribution line on the **Budget Information** tab. |
| 19. | When you are done viewing the details of the **Distribution Information** page, click the **Return** button.<br> |
| 20. | The **Schedule Details** page displays.<br><br>Click the **Return** button again to return to the **Line Details** page.<br> |
| 21. | Comments are sometimes entered with the line item. To confirm if comments were entered for a specific line item, click the **Line Comments** button.<br> |



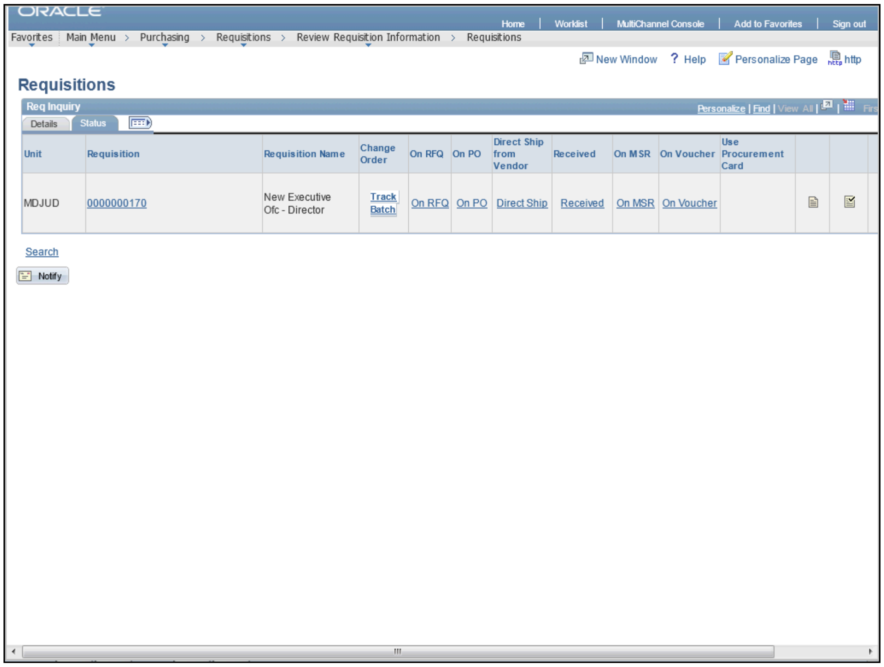

| Step | Action |
|---|---|
| 22. | The **Line Comments** page displays.<br><br>You can view comments OR attachments that have been added to the requisition. |
| 23. | Click the **OK** button to return to the **Line Details** page.<br>  |
| 24. | Click the **Return** button to return to the **Requisitions** page.<br>  |
| 25. | To view the status information related to the requisition click the **Status** tab.<br>  |

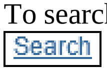



| Step | Action |
|---|---|
| 26. | Review the information displayed.<br><br>When done, click the **Approval Status** button to view approval information. |



| Step | Action |
|---|---|
| 27. | Review the approver and the date of approval for the requisition.<br><br>After reviewing the information, click the **OK** button.<br><br> |




| Step | Action |
|---|---|
| 28. | The **Requisitions** page displays.<br><br>To search for another requisition to review, click the **Search** link.<br><br> |
| 29. | You have successfully completed the *Reviewing Requisition Information (Manage Requisitions Page)* topic.<br><br>You have learned to:<br>- search for a requisition<br>- review the information associated to the requisition<br>**End of Procedure.** |

# Course Summary

**Congratulations!**

You have successfully completed the *PO230 Creating and Managing Requisitions in Purchasing* course. In this course, you have learned how to:

- Verify funds availability
- Enter requisitions for goods and services
- Commit funds to purchase by performing budget checking
- Monitor and manage budget exceptions
- Submit a requisition for approval
- Review requisition and related transaction information (i.e., purchase orders, receipts, vouchers, payments)

We hope that you found this class informative, interactive, and fun. Check out other GEARS training courses, available on the GEARS website at http://courtnet/gears/index.html (http://courtnet/gears/index.html).

We are always looking for opportunities to improve our courses. If you have ideas on improving this course please share your feedback by sending us an email at gearstraining@mdcourts.gov (mailto:gears@mdcourts.gov).